Permission Category

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Every document you file carries a permission category, and choosing it is what puts the right paperwork in front of the right people. You can change it afterwards, on one document or on thirty at once.

Introduction

Every screen that puts a document into Pipeline asks for a permission category, and it's the one field on that screen you can't work out from the file itself. The same signed contract belongs in a different category depending on which side of the deal your office is on.

Categories sort documents by audience rather than by kind. That's why the set is fixed and why there's no category called Disclosures or Closing — those describe what a document is, and a category answers who reads it. Once that lands, the choice stops being a guess: you're picking the group of people who should be able to open this file, from a list built to cover every group there is.

Nothing about the decision is permanent. A document moves between categories at any point, on its own or in a batch, and the file, its name and its comments come with it.

How It Works

Where You're Asked to Choose One

On the upload screen, when you assign a document out of Unassigned, and any time afterwards from the document's own menu. Uploading to a transaction finishes once every document in the list has a category, so the choice is made before anything lands rather than fixed up later. A document emailed in stops in Unassigned for the same reason: email has no way to set one.

Where Each Kind of Paperwork Goes

Offices settle on the same conventions, and they follow from who each category reaches. One thing worth saying plainly: **Buyer** names the side of your office that sees the document, not where the paperwork came from. The buyer's signed contract belongs under Sale when both of your agents need it.

Category	What offices file there
Listing	Listing agreements, seller disclosures, anything belonging to the listing side of the deal
Buyer	Buyer agency agreements, inspection reports, anything your buying side works from
Sale	The executed contract and the closing documents — the paperwork both agents work from
Public	Anything everyone on the deal should have that isn't sale paperwork
Office	Material for your staff
Private	Material for you and your staff

An office that handles only one side of a deal usually files mutual and other-side paperwork under Sale, so its own agent reads it whichever side they turn up on. Where your office isn't the buyer's brokerage, the contract goes under Listing or Sale so your listing agents can open it.

Changing It Later Changes Only the Audience

Moving a document to another category keeps the file, the name, the label and the comments exactly as they are. A reviewed document moves like any other, so there's no need to unreview or unassign anything first. Anyone who can see a document in its new category can open and read it — the two are the same permission.

Change the Category on Several Documents at Once

> Move a whole set of documents into one category in a single pass, which is the fast way to sort a transaction an agent filed wholesale into Private.

> **Who Can Do This**: A master admin, or an admin who can act on the transaction's documents. An agent changes categories only on documents they assigned, only to a category they can view themselves, and only before the document is marked reviewed.

To change the permission category on several documents at once:

1. Open the transaction and find the blue action bar above its documents.
2. Click the lock icon in the action bar.
3. Choose the permission category you want the documents to end up in.

4. Check the box beside each document you want to move.

5. Confirm.

The documents you checked move under their new category header in the transaction's document list, and everyone that category reaches can open them right away. Reviewed documents move with the rest and stay reviewed.

See Exactly Who Each Category Reaches

The conventions above tell you where paperwork usually goes. Before you file something sensitive, it's worth reading the categories the other way round — person by person, rather than document by document — and that's also where the one-document version of the change lives.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

Settle the Category Before Anyone Reaches the Dropdown

When the same forms keep arriving in the wrong place, the fix sits further back than the upload screen. Attach the category to the name of the document, and the choice is made for whoever files it next.

Build a shared list of your company's document names, and every agent names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

Group Documents by What They Are

Sorting paperwork into terminations, amendments or conveyancing is a different job from deciding who reads it, and it has its own tool. Reach for that one whenever the grouping you want has nothing to do with permission.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels

Decide What Follows a Listing to Its Next Offer

The category does a second job the day a deal falls through and the listing goes out again. Sorting the documents while the first transaction is still open is what saves the clean-up on the second.

A New Offer copies almost everything. The permission category on each document is what decides the exceptions — and it works in both directions.

See Control What Carries Over to a New Offer

Permission Category Troubleshooting

Someone on the transaction can't open a document you can see? Start here.

- Why Can't an Agent See a Document?